

EXHIBIT 27

Message

From: Haylee Mevorah [haylee.mevorah@alphasights.com]
Sent: 10/10/2023 11:41:51 AM
To: Aaron Kapito [akapito@politanmgmt.com]
CC: Rachel Stanford [rachel.stanford@alphasights.com]
Subject: Re: Masimo/Patient Monitoring Project



Hi Aaron,

Please find a new Masimo former below. Also wanted to flag that we have new moderated content on Medtronic, given the potential spinoff of the company's patient monitoring and respiratory business unit valued at \$7bn. Let us know if you're interested in dialing in and/or receiving a transcript for 1.0 credit.

Medtronic: Potential Patient Monitoring and Respiratory Spinoff [portal.alphasights.com]

Tuesday, October 10, 2023

11:00 AM PT | 2:00 PM ET | 7:00 PM GMT

Featuring:

- **Medtronic, Former VP, Global Pricing Strategy and Revenue Management**

[Full List of Profiles Here \[portal.alphasights.com\]](#)

Redacted [portal.alphasights.com]  Masimo Formers

Masimo - Former Remote Patient Monitoring Specialist

Dec 2020 - Jun 2022

Relevant Experience

- Former Remote Patient Monitoring Specialist at Masimo, a role held from December 2020 until June 2022
- Reported to the Head of Sales for the US
- Responsible for prelaunch end-user research and sales into strategic accounts for the Masimo W1 for the Western region, noting that he was the first hire for the new remote patient monitoring division
- Emphasizes that he conducted extensive end-user engagement to understand market needs, and then collaborated with product and engineering as the Masimo W1 was developed
- Believes that the sales strategy was to position the W1 as an addition to the Masimo portfolio of existing customers and that it was important to communicate the value proposition and new costs per patient to customers
- Notes that he set up strategic adopter viewing meetings and that the official launch of the Masimo W1 occurred after he left the company
- Details key decision makers as Telehealth Vice Presidents, Chief Information Officers, Chief Medical

Availability

Timezone: United States/New York (EDT, GMT-04:00)

Wednesday 11 Oct:

[11am - 1pm \[portal.alphasights.com\]](#)

Thursday 12 Oct:

[11am - 1pm \[portal.alphasights.com\]](#)

Officers, Medical Directors, and positions with respiratory and pulmonary expertise

- Adds that key decision-makers varied for different health systems and academic medical centers
- Names Philips and Medically Home as competitors, explaining he did not view Medtronic as a competitor to W1

[Schedule](#)

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Best,
Haylee

On Wed, Oct 4, 2023 at 2:13 PM Haylee Mevorah <haylee.mevorah@alphasights.com> wrote:

Please find [Redacted] availability below. [Redacted] LinkedIn says he left in June 2023 but will work to recruit him to confirm his last day so he will become available once compliant.

[Full List of Profiles Here](#) [[portal.alphasights.com](#)]

Redacted [[portal.alphasights.com](#)] Masimo Formers 1.5 credits per hour

Masimo - Former Fellow

Apr 2017 - May 2019

Secondary: Masimo - Former Executive Vice President, Business Development - Dec 2014 - Apr 2017

Availability

Timezone: United States/New York (EDT, GMT-04:00)

Thursday 5 Oct:

[10:30am - 12:30pm](#) [[portal.alphasights.com](#)]

Friday 6 Oct:

[10am - 11am](#) [[portal.alphasights.com](#)]

Tuesday 10 Oct:

[11am - 1pm](#) [[portal.alphasights.com](#)]

[Schedule](#)

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On Wed, Oct 4, 2023 at 2:08 PM Aaron Kapito <akapito@politanmgmt.com> wrote:

Great – happy to review profiles of 2022 departures.

Here was one 2023 departure I came across:
[\[linkedin.com\]](https://www.linkedin.com)

Redacted

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Wednesday, October 4, 2023 2:05 PM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

We are continuing to work to reach **Redacted** and will reach out to **Redacted** now as well.

Regarding formers, we will circle back with times for **Redacted**. We are prioritizing 2023 perspectives but just want to flag that from a seniority perspective, we are finding there are more experts who left in 2022. Let us know if you would like me to flag those as well as we connect with them.

Best,
Haylee

On Wed, Oct 4, 2023 at 1:57 PM Aaron Kapito <akapito@politanmgmt.com> wrote:

Thank you. We'd like to reconnect with **Redacted**, but then lets keep sourcing 2023 formers.

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Wednesday, October 4, 2023 1:55 PM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

Hi Aaron,

Please find 11 formers who focused on the US below:

[Full List of Profiles Here \[portal.alphasights.com\]](https://portal.alphasights.com)

Redacted [portal.alphasights.com]  Masimo Formers  1.5 credits per hour

Masimo - Former Fellow

Apr 2017 - May 2019

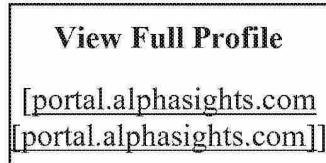
Secondary: Masimo - Former Executive Vice President, Business Development - Dec 2014 - Apr 2017

Relevant Experience

- Former Fellow at Masimo, a role held from April 2017 until May 2019, holding ~11.5 years of total experience at the company
- Former Executive Vice President of Business Development at Masimo, a role held from December 2014 until April 2017
- Reported to the CEO as Executive Vice President of Business Development and was responsible for global M&A, licensing, strategic partnerships, and product/strategic marketing
- Reported to the COO as a consultant for Masimo for 2 years until May 2019 where he focused on strategic projects in product and market development
- Estimates that Pulse oximetry has 50-60% penetration in global developed markets and the hemoglobin side of the business is much less tapped into
- Expects that margin for the core business could improve by 1-2 points maximum over the next 10 years

Availability

The expert has yet to confirm their available time slots for this specific project.
Upon clicking Request, Haylee Mevorah will follow up with the expert for their availability.



Redacted | portal.alphasights.com | Masimo Formers

Masimo - Former Director of Corporate Accounts

Nov 2019 - Apr 2021

Secondary: Masimo - Former Vice President, Sales - Jun 2013 - Aug 2017

Relevant Experience

- Former Director of Corporate Accounts at Masimo until April 2021, with 15+ years of experience in the non-invasive patient monitoring space

Availability

Timezone: United States/New York (EDT, GMT-04:00)

Thursday 5 Oct:

- Former Vice President, Sales at Masimo from June 2013 to August 2017
 - Responsible for overseeing national sales efforts for all product lines and can discuss their SET product, including pulse oximetry rainbow sensors, brain and respiratory monitors in detail, and later their continuous temperature monitoring device, which he notes monitors core rather than skin temperature, especially following COVID
 - Can speak in depth to the competitive dynamic within the industry, noting Medtronic is Mosimo's key competitor
 - Explains that Medtronic and Masimo can be compared on their technological aspects, and their headwinds and tailwinds can be compared in order to determine which company will grow in the near term
 - Highlights that Medtronic is much larger than Masimo but that the product lines the two companies compete in are very competitive
 - Adds that there is a large focus on hospital-at-home care as well as a push for more medical data monitoring with consumer products, including that monitoring for newborn babies is an example

Schedule

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Masimo Formers

Masimo - Former Regional Vice President

Dec 2019 - Oct 2021

Relevant Experience

- Former Regional Vice President at Masimo until October 2021

Availability

Timezone: United States/New York (EDT, GMT-04:00)

- Wednesday 4 Oct:

3pm - 6pm [portal.alphasights.com]

- Responsible for sales across numerous departments, most notably patient monitoring, reporting to the Vice President of Sales at Masimo, and managed ~\$80MM to ~\$90MM book of business
- Mentions that he can discuss his perspective on Masimo's shortfall
- Adds that coming out of the pandemic, more individuals purchased products and are unable to see patients, so it was more of a demand drop, and inconsistency in the market

Thursday 5 Oct:

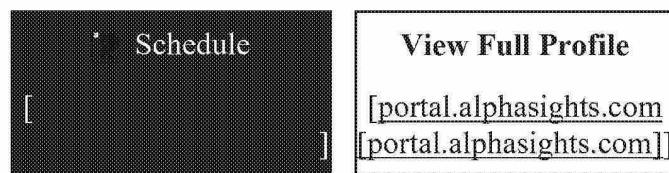
10am - 12pm [portal.alphasights.com]

,

3pm - 6pm [portal.alphasights.com]

Friday 6 Oct:

11am - 6pm [portal.alphasights.com]



Redacted [portal.alphasights.com] Masimo Formers

Masimo - Former Director of Corporate Accounts

Apr 2021 - Oct 2021

Secondary: Philips - Account Manager, Connected Care - Apr 2022 - Current

Relevant Experience

- Former Director of Corporate Accounts at Masimo from April 2021 to October 2021
- Current Account Manager, Connected Care at Philips since April 2022
- Responsible for reviving the executive-level sales relationships with IDNs and regional GPOs while driving sales accounts into cloud-based patient management and automation solutions
- Can speak to the competitive dynamics within the industry, noting Medtronic and Philips are the main competitors to Masimo
- Explains that Philips and Medtronic are relatively similar, but that all of these companies have different algorithms, adding that Masimo is more focused on

Availability

The expert has yet to confirm their available time slots for this specific project.
Upon clicking Request, Haylee Mevorah will follow up with the expert for their availability.

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disposable products, adding that the company is a more sensitive product that is advanced

- Highlights that the majority of the pulse oximetry market is dominated by Masimo
- Notes that the market is difficult for new companies to enter
- Can speak to recent developments, noting that wearables are on the rise in the industry, but includes that getting them to function in various ecosystems has proven difficult

Request

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Redacted

[portal.alphasights.com] [Masimo Formers

Masimo - Former Director of Corporate Accounts

Jan 2020 - May 2021

Relevant Experience

- Former Director of Corporate Accounts at Masimo until May 2021
- Responsible for managing 10 of the largest IDNs and 500 hospitals with a focus on the western region of the US
- Notes that Masimo is the market leader for pulse oximetry and Masimo and Medtronic combine for 95% of the market in terms of acute monitoring
- States that the market is very saturated and that companies are looking to get into more consumer-driven markets
- Highlights that COVID has increased awareness of pulse oximeters, especially with individuals with large platforms like Chris Cuomo shedding light on use cases
- Adds that many medical technology companies are moving toward more propriety technology

Availability

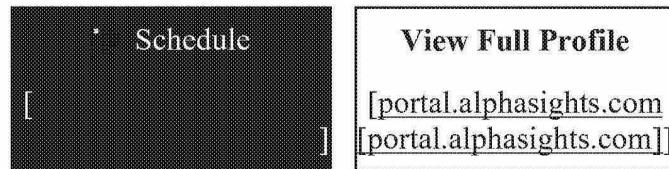
Timezone: United States/New York (EDT, GMT-04:00)

Thursday 5 Oct:

8am - 8pm [portal.alphasights.com]

Friday 6 Oct:

8am - 8pm [portal.alphasights.com]



Redacted [portal.alphasights.com] [Masimo Formers]

Masimo - Former Vice President of Engineering

2020 - Aug 2022

Secondary: NantHealth - Former Vice President of Product Development - 2014 - 2020

Relevant Experience

- Former Vice President of Engineering at Masimo from 2020 to August 2022
- Former Vice President of Product Development at NantHealth from 2014 to 2020
- Responsible for product strategy, product roadmap, and resource planning for software-based products
- Reported to the SVP of Engineering at Masimo, noting he came to Masimo through the acquisition of NantHealth Connected Care business
- Notes that he focused on ~7 products with a main focus was DeviceConX and also experience with VitalsConX, iSirona, SafetyNet, and Shuttle
- Names Philips Capsule and Medtronic as key competitors in the Patient Monitoring space
- Can discuss his perspective on Masimo's recent performance, noting that their core product is the disposables and there is a lack of focus on other product road-mapping and long-term strategic planning

Availability

The expert has yet to confirm their available time slots for this specific project.
Upon clicking Request, Haylee Mevorah will follow up with the expert for their availability.

[Request]

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[REDACTED]

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[portal.alphasights.com]]

Redacted

[portal.alphasights.com] [Masimo Formers

Masimo - Former Director, Corporate Accounts

Sep 2019 - Apr 2020

Relevant Experience

- Former Director, Corporate Accounts at Masimo from September 2019 to March 2020
- 16+ years of experience at Masimo and in his most recent role, was responsible for overseeing the entire portfolio of products and worked with larger IDNs to create awareness of existing products
- Estimates that the portfolio he managed was between \$60 million to \$100 million but states it is hard to pinpoint as he was also responsible for bringing in new business
- Notes that pulse oximetry is expanding into new areas of hospitals including step down units and medical-surgical units but it is also a challenge to put technology into spaces that were not using it before

Availability

The expert has yet to confirm their available time slots for this specific project.
Upon clicking Request, Haylee Meverah will follow up with the expert for their availability.

Request

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Redacted

[portal.alphasights.com] [Masimo Formers

Masimo - Former Director of Corporate Accounts

Oct 2019 - Apr 2021

Relevant Experience

- Former Director of Corporate Accounts at Masimo, a role held from October 2019 to April 2021
- Responsible for developing an integrated delivery network (IDN) and strategy with a focus on the eastern part of the US
- Focused on determining metrics to drive efficiency around patient safety and operational excellence
- States that Masimo's differentiator is that it can measure parameters outside of oxygen, such as hemoglobin which is extremely important, especially in the maternal and infant care space
- Notes that he built a national program to engage with C-level executives at hospitals to determine how to improve processes
- Explains that he co-published a chapter on mechanical ventilation, which is closely related to pulse oximetry, in the "Manual of Neonatal Respiratory Care" which is an intensive care manual
- Mentions that a challenge in the pulse oximetry space is that the business is being commoditized

Availability

Timezone: United States/New York (EDT, GMT-04:00)

Thursday 5 Oct:

4pm - 5pm [portal.alphasights.com]

Friday 6 Oct:

3pm - 5pm [portal.alphasights.com]

Schedule

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[\[portal.alphasights.com\]](http://portal.alphasights.com)

Redacted

[\[portal.alphasights.com\]](http://portal.alphasights.com)



Masimo Formers

Masimo - Former Area Manager

Jan 2022 - Jan 2023

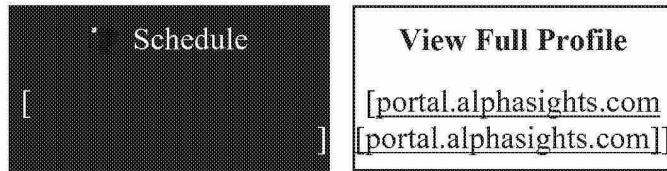
Secondary: LiDCO Group PLC - Former Sales Executive - May 2021 - Dec 2021

Relevant Experience

Availability

Timezone: United States/New York (EDT, GMT-04:00)

- Former Area Manager at Masimo from January 2022 to January 2023
- Former Sales Executive at LiDCO Group PLC (acquired by Masimo) from May 2021 to December 2021
 - Responsible for the full sales cycle from approaching the hospitals and showing the products to closing the sale
 - Sold \$1.5M+ annually across Southern England, noting she sold a variety of products including Root Platform, patient monitoring systems, SafetyNet, and Patient SafetyNet
 - Previously sold hemodynamic monitoring at LiDCO
 - Believes that Philips and Mindray had larger presences than Masimo at the time in the UK as the team was fairly new
 - Highlights a shift from monitoring at hospitals to monitoring at home



Redacted [portal.alphasights.com] [Masimo Formers]

Masimo - Former Hospital Account Manager

Jun 2020 - Jun 2022

Relevant Experience

- Former Hospital Account Manager at Masimo, a role held from June 2020 until June 2022
- Responsible for overseeing medical device sales
- Well placed to speak to market size, growth, trends, and regional regulation nuances pertaining to the patient monitoring device market, adding that she is most familiar with the Southwest, particularly Arizona

Availability

The expert has yet to confirm their available time slots for this specific project.
Upon clicking Request, Haylee Mevorah will follow up with the expert for their availability.

- Notes that Nellcor (Medtronic) is the only direct competitor of Masimo
- Highlights her familiarity with margins of key subsegments in the respiratory interventions market and the patient monitoring device market
- States that the usage volume for pulse oximetry is high, leading to increased total profitability but lower individual profit margins when compared to monitoring devices for brain function

[Request]

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Redacted

[portal.alphasights.com] [Masimo Formers]

Masimo - Former Director of Sales + Strategy — Wound Therapies

Nov 2021 - Jul 2022

Secondary: Masimo - Former Director of Corporate Accounts - Jul 2021 - Nov 2021

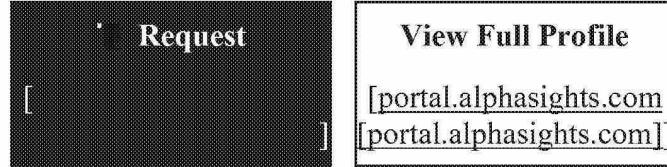
Relevant Experience

- Former Director of Sales and Strategy, Wound Therapies at Masimo, a role held from November 2021 until July 2022
- Former Director of Corporate Accounts at Masimo, a role held from July 2021 until November 2021
- Reported to the VP of Sales and was responsible for the entire US
- Responsible for managing Masimo's wound therapy products, including their newer product Centroid, a wearable device placed on patients that wirelessly monitors and records all of their health data and sends notifications to their nurses and doctors
- Highlights that he was responsible for an ~\$8M portfolio during his time at Masimo

Availability

The expert has yet to confirm their available time slots for this specific project.
Upon clicking Request, Haylee Mevorah will follow up with the expert for their availability.

- Names Smith & Nephew as a key competitor in the space, noting that Masimo was stronger than competitors when it came to IT connectivity



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On Wed, Oct 4, 2023 at 1:34 PM Aaron Kapito <akapito@politanmgmt.com> wrote:

We need folks based in the US given relative scale of business. Can you provide me with a full list of all Masimo formers currently in your network (along with dates of employment).

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Tuesday, October 3, 2023 8:49 AM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

Hi Aaron,

We recruited another 2023 sales former with availability later this week:

[Full List of Profiles Here \[portal.alphasights.com\]](#)

Redacted [portal.alphasights.com] Masimo Formers

Masimo - Former Area Manager

Jan 2022 - Jan 2023

Secondary: LiDCO Group PLC - Former Sales Executive - May 2021 - Dec 2021

Relevant Experience

• Availability

- Former Area Manager at Masimo from January 2022 to January 2023
- Former Sales Executive at LiDCO Group PLC (acquired by Masimo) from May 2021 to December 2021
- Responsible for the full sales cycle from approaching the hospitals and showing the products to closing the sale
- Sold \$1.5M+ annually across Southern England, noting she sold a variety of products including Root Platform, patient monitoring systems, SafetyNet, and Patient SafetyNet
- Previously sold hemodynamic monitoring at LiDCO
- Believes that Philips and Mindray had larger presences than Masimo at the time in the UK as the team was fairly new
- Highlights a shift from monitoring at hospitals to monitoring at home

Timezone: United States/New York (EDT, GMT-04:00)

Friday 6 Oct:

10am - 1pm [portal.alphasights.com]

Schedule



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On Mon, Oct 2, 2023 at 1:29 PM Haylee Mevorah <haylee.mevorah@alphasights.com> wrote:

Will reach out to **Redacted** and **Redacted** now.

Best,
Haylee

On Mon, Oct 2, 2023 at 1:27 PM Aaron Kapito <akapito@politanmgmt.com> wrote:

Another name that came up (different angle but related) was **Redacted**, Director Materials Management UCLA Health System. Can you confirm he would have knowledge of Masimo sensor ordering and would be willing to speak?

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Monday, October 2, 2023 1:23 PM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

We have worked with [Redacted] in the past but flagging that she left in June 2022. Let us know if you would still be interested in connecting and we can collect their availability.

[Full List of Profiles Here \[portal.alphasights.com\]](#)

Redacted

[portal.alphasights.com]

[Masimo Formers]

Masimo - Former Hospital Account Manager

Jun 2020 - Jun 2022

Relevant Experience

- Former Hospital Account Manager at Masimo, a role held from June 2020 until June 2022
- Responsible for overseeing medical device sales
- Well placed to speak to market size, growth, trends, and regional regulation nuances pertaining to the patient monitoring device market, adding that she is most familiar with the Southwest, particularly Arizona
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Request

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On Mon, Oct 2, 2023 at 1:19 PM Aaron Kapito <akapito@politanmgmt.com> wrote:

[Redacted] was a name that [Redacted] provided. Also [Redacted]

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Monday, October 2, 2023 12:32 PM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

Understood - we're on it. Will follow up asap.

Best,

Haylee

On Mon, Oct 2, 2023 at 12:30 PM Aaron Kapito <akapito@politanmgmt.com> wrote:

Ok – we are really focused on what happened in 4Q22, 1Q23 and 2Q23 so a bit tough if they left before that.

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Monday, October 2, 2023 12:29 PM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: John Mckenna <JMCKENNA@2912advisors.com>; Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

Hi Aaron,

We just connected with a new former sales perspective who was focused on the wound therapies side of the business. We are prioritizing this angle and will update you with additional perspectives asap.

[Full List of Profiles Here \[portal.alphasights.com\]](#)

[Redacted] [portal.alphasights.com]  Masimo Formers

Masimo - Former Director of Sales + Strategy — Wound Therapies

Nov 2021 - Jul 2022

Secondary: Masimo - Former Director of Corporate Accounts - Jul 2021 - Nov 2021

Relevant Experience

- Former Director of Sales and Strategy, Wound Therapies at Masimo, a role held from November 2021 until July 2022
- Former Director of Corporate Accounts at Masimo, a role held from July 2021 until November 2021
- Reported to the VP of Sales and was responsible for the entire US
- Responsible for managing Masimo's wound therapy products, including their newer product Centroid, a wearable device placed on patients that wirelessly monitors and records all of their health data and sends notifications to their nurses and doctors
- Highlights that he was responsible for an ~\$8M portfolio during his time at Masimo
- Names Smith & Nephew as a key competitor in the space, noting that Masimo was stronger than competitors when it came to IT connectivity

Availability

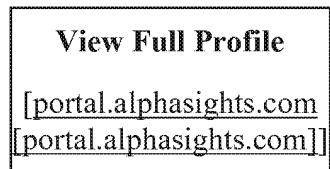
Timezone: United States/New York (EDT, GMT-04:00)

Monday 2 Oct:

4pm - 7pm [portal.alphasights.com]

Tuesday 3 Oct:

10am - 7pm [portal.alphasights.com]



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On Mon, Oct 2, 2023 at 12:17 PM Aaron Kapito <akapito@politanmgmt.com> wrote:

Hi Haylee – come across anyone else?

From: Haylee Mevorah <haylee.mevorah@alphasights.com>

Sent: Friday, September 29, 2023 3:25 PM

To: Aaron Kapito <akapito@politanmgmt.com>

Cc: John Mckenna <JMcKenna@2912advisors.com>; Rachel Stanford

<rachel.stanford@alphasights.com>

Subject: Re: Masimo/Patient Monitoring Project

We don't currently have salespeople from less than 6 months. We can definitely launch a full custom recruitment effort to get the most recent experts from early 2023. Also including Redacted availability below:

[Full List of Profiles Here \[portal.alphasights.com\]](#)

Redacted [portal.alphasights.com]  Masimo Formers

Masimo - Former Perioperative Area Sales Manager

Oct 2021 - Jan 2023

Availability

Timezone: United States/New York (EDT, GMT-04:00)

Monday 2 Oct:

[12pm - 4pm \[portal.alphasights.com\]](#)

,

[5pm - 7pm \[portal.alphasights.com\]](#)

,

[8pm - 9pm \[portal.alphasights.com\]](#)

Tuesday 3 Oct:

[12pm - 9pm \[portal.alphasights.com\]](#)

Wednesday 4 Oct:

[12pm - 9pm \[portal.alphasights.com\]](#)

Thursday 5 Oct:

[12pm - 7pm \[portal.alphasights.com\]](#)

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On Fri, Sep 29, 2023 at 2:34 PM Aaron Kapito <akapito@politanmgmt.com> wrote:
Are there salespeople in the network who left less than 6 months ago?

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Friday, September 29, 2023 2:33 PM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: John Mckenna <JMCKenna@2912advisors.com>; Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

Just to confirm, what window are you referring to? We can definitely prioritize early 2023 perspectives that are 6 months out.

Best,
Haylee

On Fri, Sep 29, 2023 at 1:58 PM Aaron Kapito <akapito@politanmgmt.com> wrote:
Understood on the Alphasights policy. First, are there any prospects that are within the window (as this is moot otherwise)?

From: Haylee Mevorah <haylee.mevorah@alphasights.com>
Sent: Friday, September 29, 2023 1:53 PM
To: Aaron Kapito <akapito@politanmgmt.com>
Cc: John Mckenna <JMCKenna@2912advisors.com>; Rachel Stanford <rachel.stanford@alphasights.com>
Subject: Re: Masimo/Patient Monitoring Project

Hi Aaron,

Thanks for sending this in. The 6-month rule is an AlphaSights policy to protect clients and is in line with best practices for our industry. Saw the request come through for [Redacted] - will follow up with his availability and will focus on recent sales perspectives.

Best,
Haylee

On Fri, Sep 29, 2023 at 1:09 PM John McKenna <jmckenna@2912advisors.com> wrote:

I think 6 months is also an Alpha Sights rule.

From: Aaron Kapito <akapito@politanmgmt.com>
Sent: Friday, September 29, 2023 1:02 PM
To: Haylee Mevorah <haylee.mevorah@alphasights.com>
Cc: John McKenna <jmckenna@2912Advisors.com>
Subject: Masimo/Patient Monitoring Project

Hi Haylee,

I'd like to change the angle here and look to set up calls with former Masimo sales people – the more recent the departure the better. We are on the board of the company, so the 6 month rule should not apply for us here.

Thanks,

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